

PREPARATION OF THE FORM 706

No matter what your view on future developments, the need to prepare estate tax returns will remain for some years to come. This program will be a "soup-to-nuts" presentation on preparing, completing, and filing an estate tax return. The program will take attendees through the necessary steps in data collection, discuss preferred methods of presentation on the return, and provide tips on creating benefits for the client while reducing the likelihood of examination. Included with the program materials will be the definitive text in California on preparing an estate tax return: "Preparation of the 706" by Raymond Bolton, published by the Professional Development Foundation. The cost of the text will be included in the program tuition. The speakers will be John A. Hartog and Albert G. Handelman, who will provide a practitioner's perspective; and Joseph P. Stemach, an estate tax attorney with the IRS for 30 years, now in private practice.



STATE BAR EDUCATION FOUNDATION
Trusts and Estates Section
180 Howard Street
San Francisco, CA 94105

PREPARATION OF THE FORM 706

PRESENTED BY

THE TRUSTS & ESTATES SECTION
OF THE STATE BAR OF CALIFORNIA



Friday, June 4, 2004

San Francisco Hyatt Regency Hotel

5 Embarcadero Center

San Francisco, CA 94111

8:15 a.m. to 5:00 p.m.

Register Online at the Section's homepage:

www.calbar.ca.gov/trusts

7.5 hours MCLE Credit

The State Bar of California and the Trusts and Estates Section certify that this activity has been

approved for MCLE credit by the State Bar of California in the amount of 7.5 hours.

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8:15 a.m. to 5:00 p.m. • Registration begins at 7:30 a.m.

REGISTRATION INFORMATION PROGRAM MATERIALS

DEADLINE: Your form and check, payable to The State Bar of California, or credit card information must be received by May 28, 2004.

MAIL TO: Program Registrations, The State Bar of California, 180 Howard Street, San Francisco, CA 94105. Make checks payable to The State Bar of California.

FAX TO: Program Registrations at (415) 538-2368. Credit card information is mandatory.

ON-SITE REGISTRATIONS: On-site registrations are on a space available basis only.

QUESTIONS: For registration information or questions, please call (415) 538-2206.

REFUNDS: All requests for refunds must be in writing and received by May 28, 2004.

SPECIAL ASSISTANCE: Please call (415) 538-2206 for special assistance or (415) 538-2231 TDD for speech and hearing impaired.

AGENDA AND PARTICIPANTS

7:30 am	to	8:15 am	Registration
8:15 am	to	8:30 am	Introductions
8:30 am	to	10:15 am	What is Included on the Return?
10:15 am	to	10:30 am	BREAK
10:30 am	to	11:50 am	How to Value Assets on the Return
11:50 am	to	1:30 pm	LUNCH
1:30 pm	to	3:15 pm	Claiming and Valuing Deductions
3:15 pm	to	3:30 pm	BREAK
3:30 pm	to	5:00 pm	Preparing the Return to Avoid Examination

Panelists:

JOHN A. HARTOG
California Trust and Estate Counselors, LLP
Orinda

ALBERT G. HANDELMAN
California Trust and Estate Counselors, LLP
Santa Rosa

JOSEPH P. STEMACH
Titchell Maltzman LLP
San Francisco

Luncheon Speaker:
CHARLES W. MORRIS
Western States Territory Manager
Internal Revenue Service, Estate & Gift Tax Division
Santa Ana

Topic Description:
What strategies has the IRS adopted in its efforts to accomplish "Compliance"? A discussion of some of the obstacles encountered over the years and new strategies which may be adopted in the future.

REGISTRATION FORM

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Note: Please use a separate form for each registrant

Name _____

State Bar Number _____

Firm _____

Address _____

City, State, Zip _____

Phone _____

Fax _____

E-mail _____

REGISTRATION FEES (Check appropriate box)

☐ \$375 Members of the State Bar of California
Trusts and Estates Section

☐ \$435 Non-Members
Note: If you are not a member, \$60 of your registration will be applied to a membership in the Section for 2004

CREDIT CARD INFORMATION

I authorize The State Bar of California to charge my program registration to my VISA or MasterCard account. (No other credit card will be accepted.)

Account Number _____ Exp. Date _____

Card Holder's Name _____

Cardholder's Signature _____

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